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MANUAL OF

BEST PRACTICES

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FROM

COUNCILS ON AGING

in

Massachusetts

MICHAEL S. DUKAKIS
GOVERNOR

RICHARD H. ROWLAND, Ph.D.
SECRETARY

Massachusetts Executive Office of ELDER Affairs

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LILLIAN L. GLICKMAN, Ph.D.
ASSISTANT SECRETARY

A MESSAGE

from

SECRETARY RICHARD H. ROWLAND

As a Council on Aging member or director, you are very important to elders in your community. As an advocate, you may be a spokesperson for your community's elders on your Home Care Corporation Board of Directors, Area Agency on Aging Board or Advisory Committee, in meetings with your legislators or in working with staff members from the Executive Office of Elder Affairs. As a service provider, you are often called upon to help with elders who have no where else to turn. Your work takes tremendous energy, commitment, and knowledge.

This Manual of Best Practices from Councils on Aging in Massachusetts reflects the experiences of people like you. It is the result of a strengthening partnership between EOEA and the Commonwealth's Councils on Aging. It could not have been written without a sharing of the ideas and experiences of many COA Directors, Board members and EOEA staff. It is truly a manual exemplifying best practices from Massachusetts Councils on Aging.

Councils on Aging and the people who work and volunteer at our Councils have much to offer Massachusetts elders. I hope this manual will assist you in building your COA Team and in moving your Council to even more success than it has enjoyed in the past.

D E D I C A T I O N

John H. "Jack" Crain, Jr.

This Manual of Best Practices from Councils on Aging In Massachusetts owes much to Jack Crain. The idea to write such a manual was his. The Manual's commitment to articulate lessons learned from doing grass-roots organizing is reflective of Jack's philosophy.

Hired by the Executive Office of Elder Affairs as a community organizer in 1964, Jack Crain became a prime mover in the growth of locally based Councils on Aging. For the past twenty-two years, he has been both a student of the COA movement and teacher to people creating and building Councils on Aging throughout our Commonwealth. Jack's belief in people enabled him to inspire local Council members to believe in their own abilities to help elders in their own communities. His belief in the power of education allowed him to share his knowledge and experience with thousands of people seeking to create new Councils on Aging or to strengthen existing ones.

This manual was written as a reflection of Jack Crain's commitment to learning and sharing. It is with pride that we at Elder Affairs dedicate this Best Practice Manual to Jack Crain.

The Best Practice Manual

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WHAT IS A COA?

A Council on Aging is an elder's focal entry point into the service network.

Lorre Mehlinger
Massachusetts Councils
on Aging (MCOA)

... local center for information and activities for elders in the community.

Denis Coleman
Peabody

...a branch of town government mandated to assess needs and to offer programs and services to meet those needs.

Ed Kenny
Bourne

Existing to improve their quality of life, a COA becomes the community switchboard where elders can plug into direct services, information, and related programs.

Len Simmons
Middleborough

Council's specialities are the use of volunteers, grassroots organizing, and local and state political advocacy.

Scott Plumb
Arlington

Councils have come a long way from their inception. They used to be recreational. Now their stature is more sophisticated, highly professionalized and dedicated to making a wide variety of services available to elders.

Bob Mahar
Worcester

Chapter 495 of Massachusetts General Laws, Acts of 1956 began it all. All cities and towns within Massachusetts are able to form Councils on Aging under this statute.

Massachusetts General Laws

C. 40, s. 8B

A city by ordinance or a town by-law may establish a council on aging for the purpose of coordinating or carrying out programs designed to meet the problems of the aging in coordination with programs of the department of elder affairs. The Council shall submit an annual report to the city or town and shall send a copy thereof to the department of elder affairs. Said department shall from time to time review and evaluate such reports and make recommendations as to any required or needed changes in said local programs. The council may appoint such clerks and other employees as it may require.

TABLE OF CONTENTS

	PAGE
INTRODUCTION.....	1
THE COA TEAM.....	2
Board Membership.....	2
Board Structure.....	3
Board Appointment Process.....	8
COA Team Roles and Responsibilities.....	9
COMMUNICATION	14
What is Communication?.....	15
With Whom Do We Communicate?.....	16
How Do We Communicate?:	
-Choices.....	19
-Ongoing Public Relations Strategies.....	22
THE SERVICE PLAN.....	26
Needs of the Community.....	26
Your Capabilities.....	27
Advocacy.....	29
Outreach.....	30
Service Delivery.....	31
COA FINANCES.....	36
Agency Budget.....	36
Elder Budget.....	40
Researching Funding Alternatives.....	43
Making Presentations.....	45
CREDIBILITY.....	50

INTRODUCTION

The "Best Practice" Manual can be read cover to cover or be used as a reference on specific subjects. In order for it to be a working document, margins were expanded to allow you to make your own notations.

The chapters provide the steps for you to follow in creating or improving a Council. In each section, definitions are given and processes explained. The text is interspersed with quotations from Council members and staff across the state.

The need for organization, planning, and communication is a recurring emphasis. By using "The Best Practice Manual," a Council on Aging Team can build a foundation for future growth and development once the commitment to elders and the community has been made.

building...THE COA TEAM

Councils on Aging (COAs) are usually founded through the efforts of interested citizens in their community. By-laws must be established through the municipality for the Council to be officially recognized.

All Councils need to continually identify what is important to them through the development of their Board. Under the leadership of their Chairperson, Board members concentrate on policy, advocacy, and education. A working relationship between the Board Chairperson and COA Director/Coordinator are invaluable to the Council.

Building your COA Team means beginning with the basics.

Board Membership is:

* A commitment to the COA's goals and philosophy

* Intergenerational

* People with a variety of skills, talents, and backgrounds

Each team member has both individual and joint responsibilities.

You should look for different kinds of individuals because the diversity makes it really exciting and unpredictable. It creates opportunities for new ideas and programs.

John Clobridge
Amherst

Every segment of the town should be represented on a COA Board. It's a big help when you're soliciting help from the finance committee if you have a town member already on your Board.

Luella Wood
Chatham

After knowing what qualities are sought, interested or new Board members should refer to the Council's written policies on Board Structure and Process of Appointment.

A. Board Structure

A Board structure assumes that terms of office, types and the selection of officers, and essential committees have already been determined.

1. Terms of Office

The steps include:

* Develop by-laws for terms of office. Consult municipal by-laws for consistency. If discrepancies occur, changes can be made.

* Set terms of office to allow for two to three year consecutive terms with the option to return after a one year absence.

* Include provisions for removal of members not meeting obligations.

Our personnel policy states that new members are required to attend Elder Affairs' ELDER ADVOCATE trainings. We feel it is an important part of their orientation.

Luella Wood
Chatham

Clear expectations and defined rules for Board members only strengthen the decision-making process.

2. Officers

Standard positions are:

- Chairman: presiding officer whose responsibilities range from facilitating meetings to establishing a working relationship with the COA Director to developing Board Members
- Vice Chairman: serves in the capacity of Chairman on an as needed basis
- Secretary: records information, maintains files on minutes, policy matters, attendance
- Treasurer: monitors and presents any budgetary decisions/fiscal matters to the Board

3. Selection of Officers

The Board Chair initiates the process...

- Convene members of the nominating committee to:

  # select a slate of officers
  # present the ballot to the full Board

•Act on committee's recommendations

first - accept further nominations
then - vote

•Recognize new officers with ceremony

by: planning introduction events
sending press releases
involving local officials

Councils have to consider extraneous influences when you choose someone for the Board. It's important to know how that choice will impact the Council. The choice has to be carefully thought out.

Lorre Mehlinger
MCOA

4. Committees

The COA Chairperson appoints committee members. Committees work on goal determination, program development, implementation and evaluation.

Recommended standing committees are listed on the next page.

- **Finance:** develops funding strategies for the COA with Director's involvement; usually chaired by Treasurer

- **Personnel:** reviews and presents suggestions to the Board on staffing at the COA

- **Nominating:** selects slate of officers; makes recommendations for new Council members

- **Legislative:** researches and updates Board on current legislation

- **Advisory:** provides input on ways to improve the Council; develop as training ground for future members

Ad-hoc Committees may be established to address specific issues. Any Board member may be selected to serve as a committee chair.

The Advisory Board is excellent for three distinct groups, namely...board members whose terms of office are up but who still want to remain involved...individuals who are very much interested in the board but who are not ready for a three year commitment...and for people who just want to share a particular expertise.

Donna Argon
Bedford

B. Board Appointment Process

Councils should:

* Fill vacancies through recommendations from Nominating Committee.

* Submit nomination letters to appointing authority three months prior to expiration of member's term.

* Announce new members after they are appointed by governing body.

COA Team Roles and Responsibilities

A Council is most effective when it draws on the knowledge and experience of its individual members and then, after due deliberation, is able to speak with one voice.

A. Speaking As One Public Voice: The Board

Concerns

* Represents interests of elders in the community
* Promotes knowledge of elder issues throughout the community
* Educates itself

Responsibilities

* Establishes an operating structure
* Selects and evaluates the Executive Director
* Develops short and long term plans for COA activities
* Obtains community support

...Questions...Listens...Evaluates...Learns...

Councils should foster a challenging atmosphere, not competitive, where we can be demanding of each other for the welfare of our seniors.

John Clobridge
Amherst

B. Your Relationship to the Team

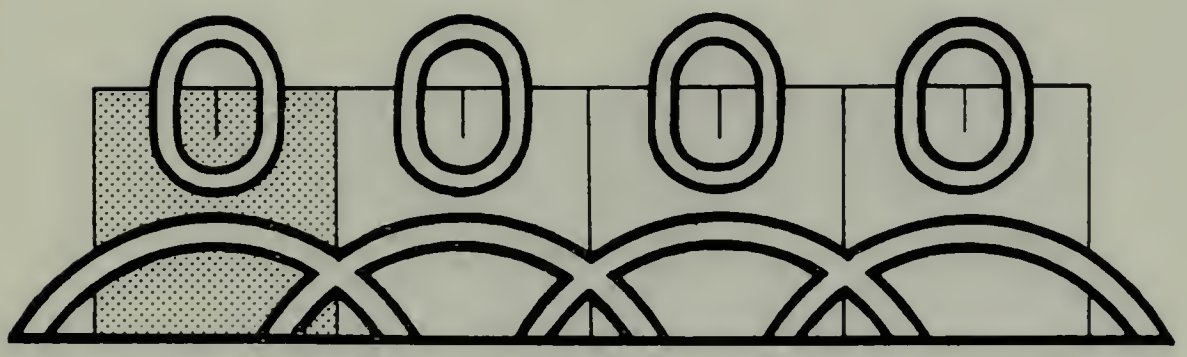
Listed below are the individual responsibilities of Board members, the Board Chair, COA Director, and agency staff.

1. Board Members

*Represent elder interests
*Promote knowledge of elder issues and concerns

•Submit items to be included in meeting agenda
•Attend and participate in Board meetings
•Vote knowledgeably
•Participate in orienting Board members
•Participate on sub-committees
•Assure good communication
•Vote on Director's staffing plans
•Vote on Director's funding strategy
•Understand and respect the Council's formal communication process
•Attend conferences and trainings

...Question...Listen...Evaluate...Learn...

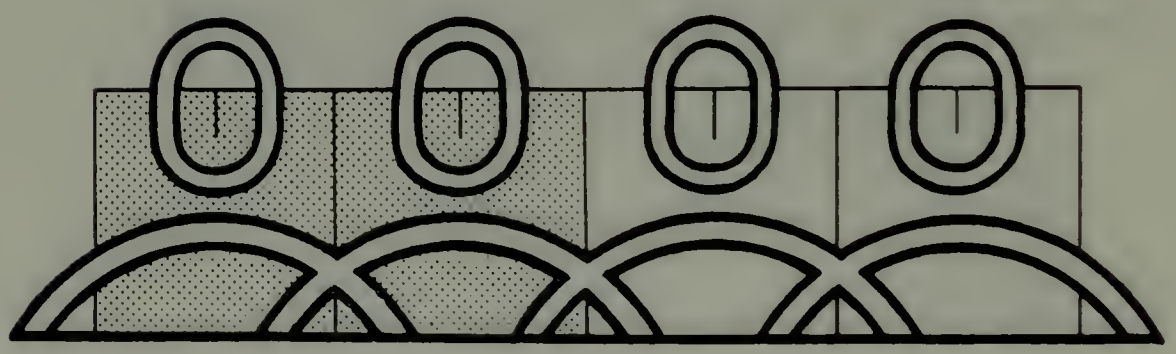


2. Board Chair

*Represent elder interests
*Promote knowledge of elder interests and concerns

•Develop agenda with Director
•Attend and facilitate Board meetings
•Present issues for Board consideration
•Appoint members to sub-committees
•Serve as ex-officio member of committees
•Supervise Board member orientation
•Motivate and develop Board members
•Assure good communication
•Present Director's staffing recommendations to the Board
•Present Director's funding strategy to the Board
•Understand and respect the Council's formal communication process
•Inform community of COA programs and activities with Director
•Attend conferences and trainings

...Question...Listen...Evaluate...Learn...

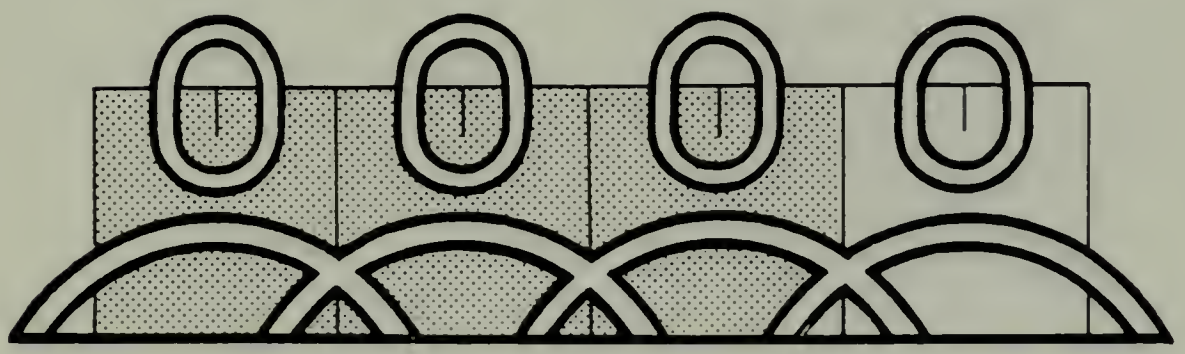


3. COA Director/Coordinator

*Represent elder interests
*Promote knowledge of elder issues and concerns

- Develop agenda with Chair
- Attend and advise at Board meetings
- Participate in Board member orientation e.g. prepare orientation package
- Recruit, hire, and supervise staff
- Plan, direct, and supervise daily organizational activities and services
- Assure good communication
- Develop staffing plan for Board approval
- Develop funding strategies in connection with COA Finance Committee
- Understand and respect the Council's formal communication process
- Inform community of COA programs and activities with Chair
- Attend conferences and trainings

...Question...Listen...Evaluate...Learn...

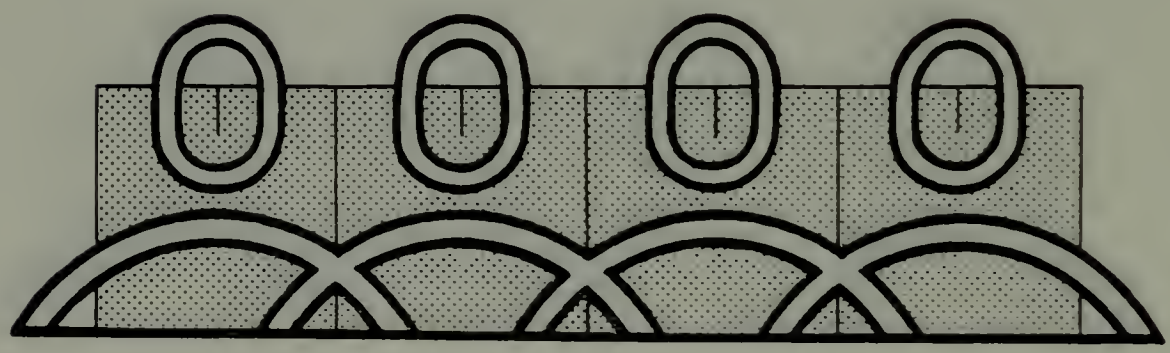


4. Staff

*Represent elder interests
*Represent interests of Council

- Carry out job descriptions to best of ability
- Attend staff meetings
- Work cooperatively with the Director to evaluate and modify how the job is performed
- Present policy and program ideas to Director for review
- Submit reports on program activities and expenditures to Director
- Work cooperatively with other staff
- Supervise support staff where appropriate
- Understand and respect the Council's formal communication process

...Question...Listen...Evaluate...Learn...



building... COMMUNICATION

What is communication? With whom do we communicate? How do we communicate? And Why?

> You may have the best programs, but if nobody knows, what good is it? We do several things -- like participate in the Greater Plymouth Council of Human Service Agencies to get exposure to other issues and groups. Communication is: how services get publicized; how you gain visibility; and how resources are made available to you.
>
> Chris Schembri
> Plymouth

> Our Council doesn't have an attitude that we can't do something. We find a resolution for every problem or need which is brought to our attention.
>
> Sandra Lapollo
> Shelburne, Buckland,
> Ashfield, Colrain

> For educational, promotional, and other purposes, we try to make information available to the children and the grandchildren of aged or at-risk elders.
>
> Jean Marie Rochna
> Salem

What is Communication?

Communication is a constant process. It's promoting awareness of:

-Who you are

-What you're doing

-Why you're doing something

-Where you are going

Communication is two way. You seek information as well as send it. It's visual, verbal, and written.

With Whom Do We Communicate?

Before planning a function or writing a speech, a Council should identify potential individuals/ groups to be addressed.

Examples of groups COAs communicate with:

* elders
* families/caregivers

* funding sources
  - Municipality
  - Home Care Corporations (HCCs)
  - Area Agencies on Aging (AAAs)
  - Executive Office of Elder Affairs (EOEA)
  - Other State Agencies
  - Federal Government

* civic clubs

* service agencies
* nursing homes

* school department

* municipal officials
  - board of selectmen
  - personnel committee
  - capital budget committee
  - finance committee

* youth organizations

* clergy/religious organizations
  - church bulletins

Additional groups include:

* emergency services

* media
  - newspaper editors
  - reporters
  - radio broadcasters

* American Association of Retired Persons (AARP)

* hospitals

* community health agencies

* Visiting Nursing Associations (VNAs)

* housing authority

* state and federal legislators

* board of library trustees

* labor unions

* business associations

Share with...Participate in...

* Massachusetts Association of Councils on Aging and Senior Center Directors (MCOA)

* Incorporated Regional Associations

Western Massachusetts Association of Councils on Aging (WMACA)

Central Massachusetts Association of Councils on Aging (CEMACA)

Cape and Islands Regional Association of Councils on Aging (CIRCA)

How Do We Communicate?

Once the target audience is known, prepare the material you want covered. Decide how the message should be conveyed. There are initially some concrete choices to make, such as stylistic decisions. But beyond the immediate concerns, a larger ongoing public relations strategy should be employed.

A. Choices...newspaper or cable television...
supportive or non-committal...
postpone an announcement because of a local crisis?

1. Types of Media

Programs, functions and even the Council's image should be promoted through the many available mediums. Listed below are examples of each type:

- VISUAL
  - -television
  - -cable
  - -slide presentation
  - -video

- VERBAL
  - -speeches
  - -radio
  - -verbal presentations
  - -individual counselling

•WRITTEN
-local newspapers
-newsletters from the COA, other organizations
-church bulletins
-reports e.g. annual/monthly documents

It's important to take advantage of every means possible to get the word out about your Council.

Jim Pirie
Marlborough

2. Stylistic Choices

The delivery of the message can vary. It is up to you how you want to be perceived, just by...

- •sharing
- •persuading
- •challenging
- •educating
- •lobbying

3. Timing

Scheduling is critical. Any concurrent activity, such as voter registration, a church fair or sporting function, can be worked into yours.

Last year, the Council planned events in conjunction with Springfield's 350th birthday. Called "A Celebration of Age," it included a senior citizen musical and fashion show at the Marriott Hotel.

Marjorie Vallone
Springfield

Also be aware of current events or local priorities which may adversely affect your attendance or intended outcome e.g. limited municipal resources.

Other options to consider

Do you want to:

... influence outcome through lobbying, etc.
... stage an event
... build up anticipation with press releases, posters, or even smaller events
... center an announcement around a crisis

Any strategy should be well thought out.

B. Ongoing Public Relations Strategies

General Principles

Public relations is an art and a business. First and foremost, plan.

* Achieve a balance when implementing a strategy...make it meaningful...the best public relations is simple; if accomplished, it will in turn convey a clear, confident message.

* Acquire the support of public officials...get them involved in your programming.

At all times, and in all cases, Councils have to keep in constant touch with all town departments and local people. We meet once a month with our Selectmen to report on and share information. It's called public relations but it is really human relations.

Nancy Keeney
Sturbridge

Strategies

- To share information/educate the public

  ...accomplished through ... training
  ... programming
  e.g. outreach
  ... reports /
  newsletter
  ... public forums
  ... press release

- To establish a relationship with the press

  ... maintain a media list with names and addresses
  ... develop personal contacts in each
  ... use all contacts when advertising an event
  ... provide press packets at functions (copy of speech, information on agency)

We try to project a very informal image which conveys to our elders that we, as a Council, want to be considered as part of their family.

Doris Simpkin,
Norma Vaz
Dartmouth

- To build an image of the Council

  ... develop a logo
  ... use - collateral materials e.g.
  brochures, posters
  - audio-visual equipment

  - a vehicle to this end is your newsletter -

  ----------newsletters----------

a. content: strive for a mix of human interest and hard information
: confirm data and sources
: use resources available to Council e.g. EOEA, AARP
: have regular reporters and assign areas
: develop editorial board...an offspring of the TEAM approach

b. printing: consider cost sharing with other communities
: reduce costs with advertisements, bulk mailing
: use vocational schools, business classes
: price senior publications - oftentimes they cost less

The newsletter is often the first contact people have with Councils. It's important to project an image of the Council that you want the community to see. That's why we have developed our newsletter for younger readers and families, too. It's another communication tool which helps our programs.

Dottie Winn
Andover

We submit excerpts from our newsletter to the Franklin Home Care Corporation's monthly newsletter.

Sally Fuller
Greenfield

c. distribution methods:	:	leave packs at stores
	:	obtain a bulk mailing permit
	:	send to...EOEA, local officials, legislators, service agencies, VNAs, churches, local newspapers...

Before a Council determines the types and number of services to be offered, it should weigh the needs of the community with the policy direction, and the Council's capabilities, i.e. size, maturity and resources. Establish priorities.

(1) Needs of the Community

There are several ways in which a Council can obtain the needed information from their community, i.e. wants, preferences, interests.

a. Hold a public forum

b. Design a survey via

1. written questionnaire
2. in person interview
3. phone survey

c. Extract information from existing sources
e.g. Information and Referral (I & R) statistics, universities, EOEA, AAA, non-profit planning agencies, United Way

d. Collect information from forums outside the Council, e.g. VNA meetings, Family Services Association, police, HCC Board Meetings

A needs assessment should be part of a Council's initial and ongoing efforts to plan and evaluate its services.

Background Information in Your Selection

1. Decide on whose opinions you are seeking

   - all elders
   - potential clients
   - a sub-sample: note: is the sample representative of the total population?
   - other service providers -- to ascertain if there is or will be duplication of efforts.

2. Train the interviewers and pretest the questionnaire to provide consistency.

3. Be familiar with the pros and cons of the different survey approaches.

Use student volunteers from your high school, local colleges and graduate programs to help plan and implement your needs assessment. Service clubs may also be helpful.

> We just finished a thorough needs assessment and will be implementing one of the findings next week -- a Social Day Care program.
>
> Ralph Froio
> Pittsfield

(2) Your Capabilities

The community's needs have to be balanced with your Council's capabilities, e.g. staffing and in-kind resources.

A. Small or New Councils

* Primarily focus on health and recreational programs

  May also:
  - plan options for expansion
  - tap other resources e.g. donations, volunteers
  - develop linkages/ consortia with other groups and Councils

B. Established Councils

* Usually have a formal organizational structure matching people with their responsibilities

  May also:
  - develop Friends' groups
  - expand programming to incorporate advocacy and outreach activities
  - undertake innovative programming, e.g. EOEA's Caring for Elders Program

C. COAs with Senior Centers

* Become the visible focal point for elders in the community

  May also:
  - offer more recreational programs
  - host a congregate meal site
  - add more sophisticated programs, e.g. EOEA's Social Day Care Program

A senior center represents a visual communication to the community of how elders are valued there. It is something we are proud of.

Louise Wadsworth
Belchertown

With energies focused, a Council can better address its programming demands in the three areas of Advocacy, Outreach, and Service Delivery.

* ADVOCACY

means making sure you represent and educate elders on issues.

Advocacy is

...Questioning...Listening...Evaluating
...Learning...Acting...

Advocacy tactics include:

- sending letters
- making telephone calls
- drafting petitions
- building constituencies through
    - rallies
    - ELDER ADVOCATE trainings
    - phone trees
- lobbying

However, do some preliminary work first --

- know the issue
- be specific and organized in your message and delivery
- establish and use contacts in ... the elder network
  ... other networks
- know the legislative process

Advocacy strategies must be carefully planned and executed.

* OUTREACH

means establishing one-to-one contact with elders who are isolated and unaware of the services available to them. It is

- informing elders on how to access services

- assessing an elder's situation and making any referrals or necessary follow-up

A position(s) for an Outreach Worker is customary, if not essential, for Councils to reach frail homebound elders.

Our Outreach Worker focuses on health insurance which is imperative now with the questions elders are raising on HMOs and DRGs.

Barbara Gustafson
Hudson

* SERVICE DELIVERY

ranges from offering recreational programs to operating a Social Day Care site.

Preventive Health

Screening
Counseling
Flu/Blood Pressure Clinics

Adult Education

Transportation

Nutrition

Education
Congregate Meal Sites
Home Delivered Meals

Information and Referral

Friendly Visitors
Telephone Reassurance

Recreation/Social

Newsletter

Support Groups
e.g. Widows, Alzheimers

Social Day Care

EOEA's:

Caring For Elders At Home Educational Program
or
SHINE (Serving Health Information Needs of Elders)

Fuel Assistance
Legal Assistance
Financial Planning

...Innovation...

Our SOS program provides a setting for recently discharged institutionalized patients to get back into the mainstream of the community by making telephone reassurance calls to clients.

The Council has also initiated an Elder Arts program. Besides featuring music, dance, and the performing arts, elders have revived some lost arts to educate the younger people in our community.

Edith O'Leary
North Reading

SPANS (Student Pals and Neighborly Seniors) promotes understanding and communication between the generations. Participating high school students are required to make a one year commitment involving regular class attendance and scheduled visits with the elderly. We recommend that the study of the aging process be included in every high school curriculum.

Evelyn Saulich
Linda Vine
Lexington

Our programs teach people how to use their spare time. This not only helps them to remain active, but it also serves to strengthen their ties with the community.

Tony Santos
New Bedford

Donated to the Library was a Bicentennial Quilt elders had made. The patches depicted exact replicas of town buildings.

Elaine Powers,
Francis Pratt
East Bridgewater

...Ideas...

This is the second year we have offered a Sunday Lunch program during the winter months. It's been a real hit!

Julie Sinclitico
North Adams

With the support of Elder Affairs, Coastline Home Care Corporation and the Fairhaven VNA, the Council now boasts a new and much needed Social Day Care program.

Doris Green
Fairhaven

Our Key Ring program is run at-cost to everyone in the community. On each key ring are instructions to forward the keys to the Council in the event they are lost. With a record on file at the Council, they can be easily returned to the owner. It is a simple marketing tool which gives the Council wonderful exposure in a passive way.

Tom Stapleton
Fall River

Students in our calligraphy class, nicknamed "Scribes", published a calendar featuring their work.

Mary Kelly
Danvers

Our Walking Club, the "Gab and Gait", was fortunate to have a local bank donate sweatshirts for the Governor's Cup.

Winifred Sanborn
Beverly

...At Work...

Our programs vary from sponsoring a monthly luncheon between seniors and students from St. John's to planning band concerts with the town's Recreational Department.

Frank Donnellan
Canton

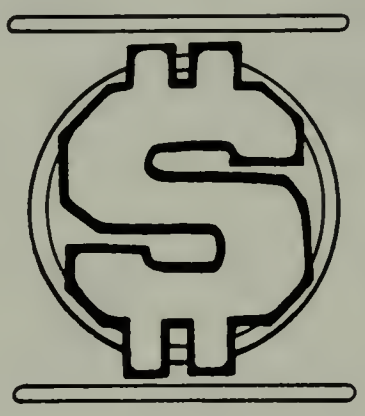
One of the most successful events our Council sponsored was a "Senior Center Day" which was designed to inform elders about the different opportunities and programs available at the Center. We structured it as an all-day event with projects for people to participate in or seminars for them to attend. It was held at the Congregational Church and its success can be attributed to the involvement of community groups from day one -- like South Shore Elder Services, the Social Service League, Public Health...

Kathy Bryanton
Cohasset

building... COA FINANCES

Ideas and programs need backing. Besides securing funds, a Council has to account for expenditures, plan for the next year and adjust the budget accordingly. It is the fiscal end of the Council's planning process which entails (1) Developing a Budget; (2) Researching Funding Alternatives; and (3) Making Presentations.

To begin with



1. Develop An

    a. Agency Budget
    b. Elder Budget

a. <u>The Agency Budget</u>

Initially, the COA Director identifies all costs incurred by the agency. Illustrated on the next page is an example of these factors broken down. Specific examples may vary.

- Sample Cost Allocations -

Examples of:

Operational Costs	utilities office supplies service contracts transportation conference and dues subscriptions printing postage rent/mortgages facility maintenance miscellaneous costs -equipment, insurance
Programming Costs	contracts recreational/ celebrations
Staffing Costs	salaries fringe benefits

Bills are then totaled in order to calculate the annual costs for each item. On the following page, extracted items from Arlington's COA Budget depict the key elements of a budget format.

-EXTRACTED ITEMS-
Arlington Council on Aging
Fiscal 1987 Budget

ITEM	SOURCES			DIRECT TOTAL
	Local	State	Federal	
Expenses				
Office Supplies	$3,040			$3,040
Dues		$319		$ 319
Staff Travel	$1,400	$360		$1,760
Contracted Services				
Health Contract	$29,669			$29,669
Home Care	$ 8,032			$ 8,032
Dial-A-Ride			$67,684	$67,684
Newsletter		$1,800		$ 1,800
Direct Service				
Meals-on-Wheels		$16,900	$ 2,738	$19,638
TOTALS	$42,141	$19,379	$70,422	$131,942

This is how the annual budget is derived.

Will the budget change next year? The answer to this question is determined by evaluating the relationship between the items on the budget to the following:

- yearly cost fluctuations
- shifts in funding levels or sources
- projections for increases/decreases in needs or services
- expected staffing or programmatic changes

Investigate anything and everything which will impact next year's budget. Make intelligent guesses.

Ask:

- Has the telephone company requested an increase with the Department of Public Utilities?
- Is a general rise in the cost of living anticipated?
- Is circulation for the newsletter increasing?
- Have suppliers notified you of any increases in costs?
- Were any changes in municipal/union personnel policies made?

- Will a change in another municipal budget affect yours?

- How do your costs compare with Councils of similar or different sizes in your area?

Projecting needs, surpluses or even a deficit will give you control over the budget and better prepare you for the future.

b. <u>An Elder Budget</u>

While monitoring the Council's cash flow, obtain dollar values for in-kind services, donations, and volunteer help.

For instance,

<u>Identify</u>

- other resources e.g. fuel assistance, USDA butter and cheese

- donations e.g. if free, the facility's rental value

Analyze

- the municipality's input

  : in contrast to others
    e.g. EOEA's Formula &
    Discretionary Grant Awards

  : over a period of five years

  : in relationship to programs
    offered/number of elders
    served

  : in proportion to taxes paid by
    elders

Creating a separate budget line-item for "in-kind" services, etc., will allow the Council to gain a better understanding of its overall fiscal situation.

Arlington's Council on Aging complete budget, for example, includes columns and information which identify and analyze their town's "Elder Budget."

-EXTRACTED ITEMS-
Arlington Council on Aging
Fiscal 1987 Budget

ITEM	SOURCES			IN-KIND
	Local	State	Federal	
Expenses				
Telephone	$4,800			$4,800
Rent and Utilities	$67,200			$67,200
Direct Service				
Companionship		$4,680		$4,680
Employment			$3,640	$3,640
TOTALS	$72,000	$4,680	$3,640	$80,320

BUDGET SUMMARY

DIRECT	$ 131,942
IN-KIND	$ 80,320

BY SOURCE (DIRECT AND IN-KIND)

LOCAL.....	$ 114,141
STATE.....	$ 24,059
FEDERAL.....	$ 74,062

It is to the Council's advantage to gain as much information as possible about its "Elder Budget."

2. Researching Funding Alternatives

Councils are limited in how they can acquire funds. Massachusetts General Laws C. 180 permits Councils (through its individual members, or with other interested persons) to establish a private non-profit corporation, called "Friends" of the Council on Aging. Friends, not Councils, are able to:

- solicit donations
- run fundraising events
- develop strategies for other sources for contributions

An application must be filed with the Secretary of State's Office for the Friends' group to be legally incorporated. A federal tax exempt number should then be acquired from the Internal Revenue Service. In some instances, the State's Lottery Commission and the Public Charities Division of the Attorney General's Office should be consulted directly when certain fundraising events are planned.

In addition to establishing a Friends' group, Councils can also:

- attract volunteers
- access stipendiary volunteer or employment programs e.g. Elder Service Corps, Senior Aides

- tap into other free assistance programs
  e.g. tax, fuel, AARP

- use stabilization funds for certain projects

- pursue a revolving or gift account with Municipal Finance Committee

- secure trusts
  such as, Selectman's trust which is under the direction of the municipality's governing body

- **seek available funding**

from EOEA:

1. Office of Programs

   - Formula Grants
   - Discretionary Grants

2. Office of Policy and Planning

   - Demonstration Projects

from AAA: Title III grants

from HCC: Contracts to provide services e.g. Chore, Social Day Care

- procure public/private grants

  ...RFPs (Request for Proposals) from other state agencies, e.g. Executive Offices of Communities and Development and Transportation and Construction

  ...Grants from foundations, corporations

3. Making Presentations

Using both the "agency's" and the city/town's "Elder Budget," keep the community, funding sources, and interested parties informed of your progress. Why? Because it will:

- support existing needs
- give the Council visibility
- open new avenues for involvement by others

Accomplish these goals by:

(a) Gathering Information and Support

Know the Council's history, policies, and budget in order to respond to such questions as...Why has the budget been graduated/consolidated?...How is the Council different from other elder programs?

This means a Council should:

1. Compile statistics

and

- keep records e.g. number of elders served, resources used

- verify all documentation e.g. is it accurate/reliable?

2. Develop forms, charts, etc.

Rehoboth COA develops a monthly Coordinator's Report outlining: the number of volunteer hours contributed to different programs; the number of incoming and referral calls; the number of training and newsletters mailed; and the number of visits/people served by the different COA programs....

Eleanor Aldous
Rehoboth

3. Perform comparison studies of comparable/contiguous communities

4. Be aware of the local financial atmosphere and plan the budget in response to it.

5. Lobby

- build a constituency on an ongoing basis

  ...educate elders
  ...transmit information

- nurture relationships with municipal officials

Applying these principles should be straightforward and a matter of practice. One such example is the appeal made by the Monson COA to their constituents in an issue of their newsletter.

"...is the date for the Town's Annual Meeting to vote on the upcoming budget...The meeting will be held at 7:00 p.m. at the Junior/Senior High School. Your Council on Aging requests that you attend this meeting and vote in support of the Council's budget. We need you... You, the seniors in town, contribute hundreds of thousands of tax dollars. Your vote must be counted."

(b) Making the Actual Presentation

1. Prepare the content of the Council's presentation

   a. Bring sample documentation

   b. Invite elder constituents to share their personal experiences

   c. Address appointing Board in personal manner

   d. Defend budget

   e. Solicit questions

Know facts and be able to insert, interpret, and extrapolate.

2. Be concerned with style

   a. Be clear, concise

   b. Use facts

Show unity by having whole Board attend.

3. Concentrate on any <u>follow-up</u>

   a. Make a follow-up call to Chairman of Committee if follow-up information is needed

   b. Submit follow-up information on a timely basis

   c. Submit copies of any presentation to local media

Continue lobbying and public relation efforts to support the budget.

building. . . CREDIBILITY

Credibility is synonymous with a good reputation. Developed by concentrating on quality rather than quantity, credibility is necessary for your Council to be effective. It is gained by communicating and acting upon your objectives.

A Council on Aging should:

* Speak as <u>one</u> public voice

  ... state clearly the philosophy and goals

  ... create by-laws which support Council goals and policies

  ... develop short and long term programming and budgeting plans, e.g.

  . demonstrate fiscal accountability
  . maintain a comprehensive and up-to-date database, e.g. elders using services
  . find a site for a future Senior Center if one does not already exist, e.g. look for a separate building which is centrally located

... work as a Team

* Establish a COA that reflects the entire community

  ... know and represent all elders in the community, e.g. homeless, nursing and rest home residents, frail homebound, employed elders

  ... work with and through the community, e.g. private agencies

  ... establish links with other municipal departments/public officials

  ... create an atmosphere of give and take, e.g. participate in community events

* Take a vocal and visible role in the aging network

* Question...Listen...Evaluate...Learn...

No single service, no matter how well organized or how totally dedicated to its clients, can meet all of the needs for all of the elderly. Local Councils, as truly grassroots organizations, can go a long way toward identifying these needs, providing services in a cost-effective manner and preventing fragmentation of efforts.

Councils on Aging will continue to play a unique and essential role in building a better future for the elders in their community.

Asked the question, "What would you like to give to, or envision as, the future for your Council?", the words from COA Directors' bring the future closer to home:

> Information, education, and communication are central to our future. We need to help people as they grow older to be life - long learners and teachers. It is vital that we start shaping policy now that will help the baby boom elders of the next century.
>
> John Clobridge
> Amherst

> Our role will increase tremendously in the next decade...I'm ready to do whatever is needed to keep elders on the move.
>
> Bob Mahar
> Worcester